



Challenges for the European Defence Technological and Industrial Base



REPORT

from a high-level evening debate organised by the Finnish EU Presidency,
the European Defence Agency and the Security & Defence Agenda
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SECURITY & DEFENCE AGENDA

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ABOUT THE EVENT

The Finnish EU Presidency together with the Security & Defence Agenda and the European Defence Agency organised a high-level evening debate in Brussels on November 13.

The event launched the debate on the European Defence Technological and Industrial Base (EDTIB). Speakers discussed why the EDTIB is needed for ESDP to be effective, what industrial capacities will be needed in the future, the particular characteristics of the defence sector, and the importance of security of supply and industrial sustainability.

The seminar also looked at Research and Technology, and how to harness the innovative potential of the European industrial base.

Nick Witney, Chief Executive of the European Defence Agency acted as a moderator and the high-level panellists included **Seppo Kääriäinen**, Minister of Defence, Finland, **Christian Schmidt**, Parliamentary State Secretary to the Federal Minister of Defence, Germany, **Radoslaw Sikorski**, Minister of Defence, Poland, **Günter Verheugen**, Vice-President and Commissioner for Enterprise and Industry, European Commission and **Charles Edelstenne**, Chairman of AeroSpace and Defence Industries Association in Europe (ASD)

Held at the prestigious Bibliothèque Solvay, the event gathered an audience of over 160 participants from EU, member state governments, diplomatic representations, industry, academia and think tanks and press.



INTRODUCTION

On behalf of the Finnish EU Presidency, I am delighted to have contributed to this evening debate on “*the European Defence Technological and Industrial Base*” (*EDTIB*) organised in co-operation with the European Defence Agency (EDA) and the Security and Defence Agenda (SDA).

It goes without saying that the European defence industrial base is a prerequisite for the improved capabilities we will need in the future European crisis management tasks. The EDA Steering Board, in National Armaments Directors formation, took a first look at this issue already in September with a paper describing the characteristics of the industrial base in this field. EDTIB will also be on the working agendas of the European Defence Agency and the European Commission during 2007.

We have to see to it that we have the right kind of defence industrial base in Europe. **Although**, we should be aware that improving the current industrial picture may require some time, we should also be aware that it is very difficult to regain industrial expertise once it has been lost. It is therefore all the more necessary to take decisions in good time to be able to answer the capability challenges of the future.

This evening debate rightly concluded the correct approach to the EDTIB has to be long-term and strategic. I am looking forward to a fruitful interplay between the various stakeholders during the course of 2007.

Dr. Seppo Kääriäinen
Minister of Defence of Finland

EXECUTIVE SUMMARY:

Once the panellists had had their say, it was clear that a certain amount of consensus had been reached on how the European defence industry, or rather the European Defence Technological and Industrial Base (EDTIB), could be revitalised.

Several things were clear:

- An increase in effective research spending was essential
- The approach to rationalise the EDTIB had to be long-term and strategic
- Cooperation, not replication, was seen to be the way forward
- SMEs' expertise had to be promoted
- Centres of excellence should play a pivotal role in any plan

The role of the European Defence Agency (EDA) as a facilitator was agreed to be a key factor in the development of a European defence industry fit to support the aims of the ESDP. Representing the outgoing Presidency, Finland's Minister of Defence, **Seppo Kääriäinen**, was keen to emphasise the importance of research and the role that could be played by SMEs.

As a representative of the new Member States, Polish Foreign Minister **Radoslaw Sikorski**, objected to the idea that his country might be made to buy European when it was primarily interested in buying the best. Other issues that refused to go away included the varying structures of the national defence industries across Europe, several having their own particular blend of restrictive practices: *juste retour*, state aid, offsets, etc. It became apparent that these could only be solved if they were included as part of a total long-term review of the European defence market.

Both **Christian Schmidt**, Parliamentary State Secretary to the German Federal Minister of Defence, and AeroSpace and Defence Industries Association in Europe (ASD) Chairman, **Charles Edelstenne**, warned that some Member States would have to abandon their national defence industry in favour of the greater European goal. That would mean tough political decisions and the acceptance of mutual confidence in, and inter-dependence of, EU Member States. **Günter Verheugen**, Vice-President and Commissioner for Enterprise and Industry, looked ahead to a European defence market where fair competition and transparency prevailed, and placed the responsibility for its implementation firmly with those Member States.

The moderator, EDA Chief Executive **Nick Witney**, introduced the debate, saying that there is a lack of a level playing field when it came to transatlantic defence trade, it was then left to **Charles Edelstenne** to spell out the result if no actions were taken to sustain a strong, more independent European defence industrial and technological base as stated by the EDA Steering Board. In that case, Europe would become rather an American sub-contractor than a partner.

THE VIEW OF THE OUTGOING EU PRESIDENCY ...

Finland's Minister of Defence, **Seppo Kääriäinen**, focused on the need for innovation and the important role to be played by SMEs. Innovation needs the right market conditions and Kääriäinen argued that this meant spending more on R&T and fostering greater collaboration. He also highlighted Finland's belief in research; he wanted a more efficient defence market and that included the simplification of intra-union transfer rules for military equipment.



Seppo Kääriäinen, Minister of Defence, Finland

Stressing the use of SMEs in Finland's defence market, Kääriäinen said that many came from the civilian marketplace and gave dual-use solutions. He saw this as the best way forward for many EU Member States and offered the example of the development of the correct kind of innovative environment developed in

Northern Finland (SMEs, scientific community, universities and industry working together).

Kääriäinen added that the defence industry could learn from civilian manufacturers as they had much shorter lead-times. He wanted the European defence industry to be pragmatic – it could leave basic research to universities and the scientific community in general, while it made more use of the civilian sector.

“Innovation is the key; Europe must spend more on R&T and foster greater collaboration.”

Seppo Kääriäinen

... AND OF THE INCOMING

Christian Schmidt, Parliamentary State Secretary to the German Federal Minister of Defence, wanted the successful operation of the European armed forces. He defined the creation of an efficient and reliable European defence industry as a pre-requisite. That is where the problems started, as he saw too much national thinking and insufficient attention being paid to the development of a European approach.

Making a reference to issues that are currently part of the European defence industry scene – state aid, article 296¹ and offsets² – Schmidt called on all EU Member

¹ Article 296 - under which the defence equipment market is exempt from the rules of the single market. At an SDA session (Space Roundtable 16-10-06), Commissioner Verheugen said he regretted the need for a license when defence-related equipment was exported from one Member State to another. In order to address those issues, the Commissioner added he was working with Commissioner McCreevy to present an interpretative communication on how Article 296 should be interpreted.

² At earlier SDA events, Witney as a speaker had said he wanted to avoid any proliferation of offsets that ran along protectionist lines. (SDA defence procurement roundtable - 18/04/05) and also that the EDA's code of conduct had had "article 296" fairly and squarely in its sights, as it would allow all EU countries to bid for all contracts. As for offsets, there were differences of

States to work with the EDA to develop an efficient EDTIB that would assist in the creation of a European defence industry where everyone had an equal chance.



Christian Schmidt, Minister of Defence, Germany

Schmidt argued that the creation of an efficient EDTIB implied that:

- The parallel development and procurement of military equipment in several Member States had to be replaced by armaments cooperation
- Member States' governments had to continue to support consolidation of the European defence industry by the creation of centres of excellence
- National priorities (as defined for example in the UK's defence industry strategy) had to be consolidated in a European context
- Not all EU Member States would be able to retain their own defence industry and some had to be willing to abandon capabilities in favour of the common goal

Schmidt concluded that the EDA should act as moderator and facilitator of change so that the new EDTIB guaranteed security of supply, based on the principles of inter-dependence and complementarity. However, he saw the European defence industry continuing to open markets in Asia as well as in the US.

opinion; some said they were "an essential fact of life" while others said they were bad for competition. (SDA-CSIS conference on defence integration – 12/10/05).

The Commission's examination of the rules concerning intra-union transfers of defence goods had to be supported by Member States and there would be further harmonisation of the defence marketplace – supported by the incoming German presidency – based on the EDA's code of conduct.

A NEW MEMBER STATE'S OPINION

Radoslaw Sikorski, Poland's Minister of Defence, stressed the importance of European defence to his country and insisted that Poland wanted to play a full part in the technological and industrial parts of the ESDP. Poland had recently signed a Memorandum of Understanding (MoU) with Germany and the Baltic States to create a Battle Group (to be operational in 2010) and it saw the creation of an efficient EDTIB as crucial.



Radoslaw Sikorski, Minister of Defence, Poland

Sikorski was critical of the current situation. Despite spending almost €200 billion per annum on defence goods – said to be approximately half that of the US expenditure - Europe received relatively little in return. This was essentially due to duplication across the EU and Sikorski wanted Europe to develop the same economies of scale as the US achieved.

That was the reasoning for Poland joining the code of conduct, and that had been a very painful decision according to the Defence Minister. The country was only just recovering from the break-up of the

Warsaw Pact and there had been strong resistance from the Polish defence industry and trade unions.

“The decision for Poland to join the code of conduct was a very painful one.”

Radoslaw Sikorski

On the positive side, Sikorski said that Poland was increasing its defence budget and the amount spent on procurement. In addition it had reached the NATO standard of 2% of GDP on defence expenditures, and he called on all Member States to do the same. In conclusion, he called on the EDA to bring together all Member States to deliver new capabilities, to share risks and participate in joint programmes.

THE COMMISSION'S OUTLOOK

Günter Verheugen, Vice-President and Commissioner for Enterprise and Industry, described Europe's need for an appropriate EDTIB so it could be autonomous in order to play its role as a global partner and protect its citizens. However, Verheugen saw so much fragmentation across the EU that he argued that a EDTIB did not exist. With many EU Member States defence budgets declining, the gloomy picture predicted by some might prevail.

“The Member States need to get their act together to allow the European defence industry to broaden its options.”

Günter Verheugen



Günter Verheugen, Vice President, European Commission

The Commissioner reasoned that the end result might be the transfer of R&T facilities away from Europe. The Commissioner could only draw one conclusion; the Member States had to get their act together in order to allow industry to broaden its options.

Verheugen had seen a consensus develop that the EDTIB must be competitive, have less duplication, more mutual dependence and greater specialisation. The question was how to achieve those goals? Commissioner Verheugen had two suggestions:

- All Member States had to recognise that there was significant redundant capacity in the industry, linked to the existence of non-competitive facilities. Rationalisation was required, accompanied by greater specialisation.
- Reflection was therefore required in order to define:
 1. The key technologies required by the EU
 2. In which member states the expertise in critical technologies resided
 3. The acceptable level of inter-dependence for: security of supply, technology transfer and SME involvement in the supply chain

Verheugen confirmed that the Commission would present proposals in 2007: a directive on defence procurement and a regulation on defence equipment transfer. Using software-defined-radio as an example, the Commissioner said that the Commission, EDA, Member States and industry were all involved in R&D related in its development. There had to be better coordination in such a vital markets – such as communication technologies – for the benefit of European competitiveness.

Progress was required on the creation of a European defence market where fair competition and transparency prevailed, and the efforts had to be supported by all parties and especially by the Member States.

INDUSTRY'S VIEW

AeroSpace and Defence Industries Association in Europe (ASD) Chairman, **Charles Edelstenne**, gave the full support of his association to the need for a strong EDTIB that was less dependent on non-European sources for key defence technologies. However, he realised the difficulty in bringing together 25 different DTIBs that were based on national priorities and contained redundant capabilities.



Charles Edelstenne, ASD

In order for Europe to meet its foreign and security policy goals, there was a need for a competitive European defence market based on military assets being shared regardless of their location. Edelstenne argued that each EU Member State had to determine the direction it wanted to take in regard to industry defence capabilities. Each one had to say which capabilities:

- would continue to be sourced nationally?
- would be sourced and shared through the EU?
- would be sourced via the world market?

Based on the results, Edelstenne wanted to define a common European approach and scope for its defence industry. He also understood that the EDTIB had to be based on the willingness of Member States to share and accept inter-dependence, and to have a shared responsibility for the funding of military and defence capabilities.

The future of the EDTIB depends on Member States' willingness to accept inter-dependence and shared funding of military and defence industry capabilities

Charles Edelstenne

Europe had to concentrate its funds on sustaining key technologies in order to meet its political ambitions on the global stage. Edelstenne reminded the audience that the greater the collective effort, then the more affordable the EDTIB would be. The ultimate goal was consensus across 25 Member States, but it had to start with the proactive ones followed by the rest when they were ready to join.

THE Q&A SESSION

PROBLEMS, PROBLEMS, PROBLEMS!



Jean-Dominique Giuliani, Fondation Schuman

Defense News' **Brooks Tigner** had two "huge obstacles" for the government ministers, namely offsets and *juste retour*³. Tigner wanted to know how these issues could be resolved. The Fondation Robert Schuman's **Jean-Dominique Giuliani**, wanted to know how EU Member States could be persuaded to buy European products for their defence needs. Safran Group's **Jacques Cipriano** did not understand why the defence industry could not solve its problems as a similar-sized industry – city buses – had completely eliminated issues such as offsets. Finally, the WEU's **Paolo Brito** wanted details on how the European defence market would create a level-playing field where SMEs from the smaller Member States would not be excluded.

Poland does not want to return to monopolies, the focus must be on putting together the best package.

Radoslaw Sikorski

³ The arrangement where each country gets a share of work exactly in proportion to the equipment it buys.



Jacques Cipriano, Safran Group

OFFSETS, *JUSTE RETOUR* AND THE CONSEQUENCES OF A EUROPEAN DEFENCE MARKET

Commissioner Verheugen confirmed that the issue of offsets would be addressed in the Commission's end-of-year communication on defence procurement. Schmidt ruled out *juste retour* as a way of working in the future (within a European market) as a balance between those investing and those sharing was a necessity. He argued that the problem was the varying traditions and structures within the European national defence industries. Those European industries that relied on competition ahead of preservation had to be promoted.

Sikorski saw *juste retour* as the way that business was done at the moment, giving the AGS project – where Poland wanted to get involved – as a prime example. His defence ministry wanted the best equipment at the cheapest price but he could see why countries wanted to retain their core competencies.

The Polish Ministry of Defence's Director of Armaments Policy **Adam Sowa** had the answer – offsets could not be reviewed in isolation. Poland wanted the best options for its defence expenditures. In regard to the EDTIB, Sowa did not rule out partnerships. He wanted the economies of scale and he could see the benefits in several Member States making the same choices, but commercial considerations

had their place. So offsets had to be seen as part of the bigger picture, with common programmes, common R&T and overall coordination.



Adam Sowa, Ministry of Defence, Poland

Kääriäinen agreed with Schmidt that the creation of a well-functioning defence material market was difficult due to the history of the various markets across Europe. He called for patience, arguing that if the objective of creating a European market was important, then a step-by-step approach was required in order to remove the various obstacles.

Edelstenne could see many contradictions – centres of excellence, offsets, research, best technology, low prices – that made the objective a difficult one. He was yet another speaker to insist on a long-term strategic approach.

THE IMPACT ON THE NEW(ER) MEMBER STATES

Edelstenne said that in some Member States, national defence industries might disappear if they were not competitive and if they did not have centres of excellence; if that did not happen the market would not be effective and the Member States would have to buy in the US, as there will not be a competitive European offer. Edelstenne warned that this would lead to a situation where European industry would become a sub-contractor of US industries.

To Sikorski, that sounded as if Edelstenne was mapping out the same result for some EU Member States (i.e. a disappearing defence industry) as he had

suggested might happen to all EU Member States under pressure from the US. Sikorski commented that these were sensitive issues, involving political considerations and jobs. Partnerships might be a way forward but Poland was attempting to shelter itself from political pressures and corrupt practices – via new legislation – and he had been surprised to hear suggestions that Member States might have to buy equipment simply because it was made in Europe. Poland just wanted to buy the best!

“If defence industries in some Member States are not competitive or do not have centres of excellence, they might disappear.”

Charles Edelstenne

Eurocopter Vice President **Arnaud Hibon** suggested that Member States should buy the best and if that was a European product, then so much the better. Sikorski did not agree at all, as he thought that the idea of *buying European* was a disservice to European engineering expertise and would be counter-productive. There would be no incentive for suppliers to make the best offer possible. Sikorski wanted the focus to be on putting together the best possible and most competitive package. He had seen enough of government monopolies during the Cold War period and he did not want to repeat the experience. Sikorski wanted a transatlantic open market and greater competition. That’s why Poland had joined the EDA.

Edelstenne agreed fully with open market and greater competition, and advocated against an "European fortress". He argued that the Members States policy should be to consider their interest in the long term, and that this policy should not be affected by factors such as the exchange rate US \$/Euros which distort market and

competition and which would lead to a situation where US industries have the monopoly. He added that something has to be done as there are different rules governing the US and European markets. There were very few examples of European sales to the US, in comparison to those in the opposite direction. Edelstenne argued, and this was accepted, that partnerships had to be based on using the expertise of each Member States, not on bringing together non-competitive industries..

Witney nevertheless argued that there was not a level playing field in transatlantic relations at the moment.

SME CONSIDERATIONS

Edelstenne argued that the competency of the SMEs was the key, rather than their size. Kääriäinen reasoned that SMEs were flexible enough to form clusters in order to protect themselves from any issues on size. Schmidt could see advantages in specialised SMEs having a market larger than their own, but he agreed that the issue had to be examined carefully.

WHAT ABOUT COMMON REQUIREMENTS?

Thales Vice President **Martin Hill** wanted to hear about the demand side, asking when the military requirements would be harmonised. Both Schmidt and Kääriäinen agreed that that was a key question, but they both reasoned that the first step had to be a review of the varying structures (and histories) of the Member States' defence industries. That included political consultation – and that was not for today.

THE SCOPE FOR NON-EU PLAYERS

The Turkish Embassy's **Muzaffer Akyildirim** had the final question of the evening, asking how the EDA planned to attract non-EU partners to make their contribution to the creation of an effective EDTIB. In response, Witney said that it raised several issues, such as how Europe should deal with partners adjacent to its borders and how should the transatlantic dimension be approached. Speaking against "fortress Europe",

EUROPEAN DEFENCE TECHNOLOGICAL AND INDUSTRIAL BASE



Günter Verheugen, Nick Witney, Radoslaw Sikorski and Christian Schmidt



The delegation from Cyprus including the Defence Minister Nicos Symeonides (second from right)



Participants



The Bibliothèque Solvay



Q&A Session



Seppo Kääriäinen and Christian Schmidt at the reception afterwards



Jacques Cipriano, Safran and Bill Giles, BAE Systems



Participants enjoying the drink afterwards

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THE SECURITY & DEFENCE AGENDA (SDA) IS THE ONLY SPECIALIST BRUSSELS-BASED THINK-TANK WHERE EU INSTITUTIONS, NATO, NATIONAL GOVERNMENTS, INDUSTRY, SPECIALISED AND INTERNATIONAL MEDIA, THINK TANKS, ACADEMIA AND NGOs GATHER TO DISCUSS THE FUTURE OF EUROPEAN AND TRANSATLANTIC SECURITY AND DEFENCE POLICIES IN EUROPE AND WORLDWIDE.



Stefan Zollar and Gen Harald Kujat



Günter Verheugen and Karl von Wogau



Vecdi Gönül and Jaap de Hoop Scheffer

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Atlantic Rendez Vous transatlantic satellite debate organised in conjunction with SDA's event

A *Security & Defence Agenda* Report

Rapporteur: John Chapman

Photos: Bénédicte Maindix

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